Reporting Tools

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Reporting Tools

In this lesson you will learn about the variety of reports available to assist you in getting your job done. Avatar's reporting tools are invaluable for producing real-time, up to date information.

This lesson specifies which reports are likely to be used by administrators and clinicians and which reports are likely to be used by managers and supervisors.

Lesson Objectives

- Understand the different reporting tools available to administrators, clinicians, managers, and supervisors

- Learn to access, view, and print reports

UNDERSTANDING REPORTING TOOLS

Avatar's reporting tools are an invaluable feature for producing real-time, up to date information. This lesson organizes reports based on who can use them: Both Clinical and Administrative staff, Clinical staff only, and Supervisor staff only. For a detailed description of how to work with a report window, see Lesson 8 in the *Introduction to Avatar* manual.

NOTE: Reports that are in draft form display the word DRAFT in a watermark across the center of the report.

WHO CAN PERFORM THIS FUNCTION?

Administrative, clinical, and supervisory staff members use this feature. The reports that are available to an individual are determined by permissions set up in Avatar. The Avatar PM menu and the Avatar CWS menu contain some of the same reports, such as Face Sheet, but most of the reports differ in these menus.

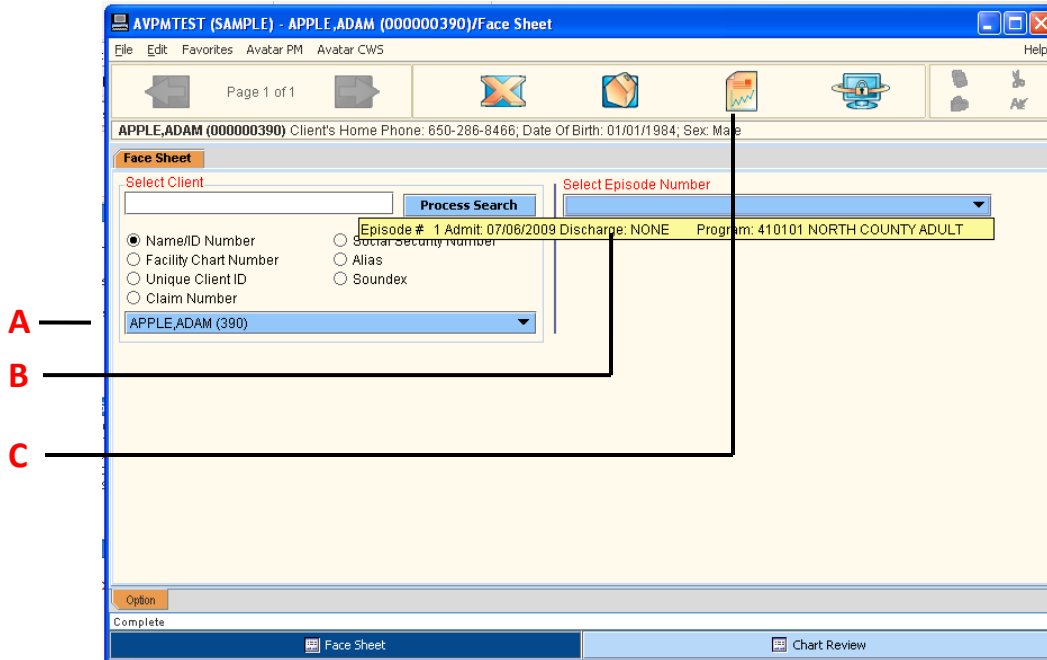## MENU PATHS

You can find all Reports in one of two menus:

- Avatar PM→ Reports→<report name>
- Avatar CWS→ Reports→<report name>

CLINICAL AND ADMINISTRATIVE REPORTS

The following reports are typically used by clinicians and administrators.

FACE SHEET REPORT WINDOW

The Face Sheet is a summary of key client information.

Field	Description
A) Select Client	Verify the name of the client.
B) Select Episode Number	Select an episode number from the dropdown.
C) Process Icon	Click this icon to generate the Face Sheet.

Below is an example of the Face Sheet report window.

Avatar adds another level of access to information at the bottom of the Face Sheet report called Episode Data Drill Down. By clicking any of these links you navigate directly to these additional reports. (You can also access these reports directly from the Reports command in the Avatar PM or Avatar CWS menus.)

PROGRESS NOTES REPORT

Avatar CWS→Reports→Progress Notes Report

Generates a report of all progress notes for a client within a set date range regardless of episode. Navigation is available (using the above menu path rather than the Face Sheet link) so you can navigate to notes for a specific episode.

PROGRESS NOTES REPORT BY CLINICIAN

Avatar CWS→Reports→Progress Notes Report by Clinician

Generates a report of all progress notes written by a selected clinician within a set date range. Navigation is available so you can review both draft and final notes.

DIAGNOSIS REPORT

Avatar CWS→Reports→Diagnosis Report

INFOSCRIBER MEDICATIONS REPORT

Avatar CWS→Reports→Infoscriber Medications Report

Organized by client. Lists client allergies recorded in Infoscriber as well as current Prescriptions. Prescription information includes order date, drug name, dose, prescriber name, number of refills, prescription end date, and pharmacy name.

This report has two additional linked reports: Rx History for Last Year and Non-Infoscriber Prescriptions (reported by client).

ASSESSMENT REPORTS

Avatar CWS→Reports→Assessment Reports→<report name>

- Adult Admission Assessment Report
- Adult Annual Assessment Report
- Adult Special Assessment Report
- LOCUS Report
- Mental Status Exam Report
- Child/Youth Admission Assessment Report
- Child/Youth Annual Assessment Report
- Child/Youth Special Assessment Report
- CALOCUS Repot
- Mental Status and Behavioral Observation
- Substance Use Assessment Report
- Physician's Initial Assessment Report

- Pre to 3 Admission Assessment Report

- Chapter 26.5 IEP Assessment Report

CASELOAD REPORTS

Avatar CWS→Reports→Caseload Reports→Caseload Report by Program

Avatar CWS→Reports→Caseload Reports→Caseload Report by Clinician

- Caseload Report by Program
Select by program—programs are listed by name, not program number. Information listed by primary therapist and primary psychiatrist. One line of information per client. Client information includes:

  o Name

  o Client ID

  o CA/LOCUS

  o Level of Care

  o Co-occurring Dx

  o 26.5 Indicator

  o Next IEP Date if 26.5

  o Primary Dx

  o Last Date of Service

- Caseload Report by Clinician
Select by clinician. Lists all clients for whom the clinician is the primary therapist or primary psychiatrist. Format of report is the same as the above Caseload Report by Program.

O.D./W.I.C.C. STATUS REPORT

Avatar CWS→Reports→O.D./W.I.C.C. Status Report

SKILLS AND ASSESSMENT REFERRALS REPORT

Avatar CWS→Reports→Skills and assessment Referrals Report

ACTIVITY TRACKING REPORT

Avatar CWS→Reports→Activity Tracking Report

CALL INTAKE HISTORY REPORT

Avatar CWS→Reports→Call Intake History Reports

VAX LOCUS HISTORY REPORT

Avatar CWS→Reports→Vax LOCUS History Report

This report displays a chart of a client's historic LOCUS scores based on data imported from VAX.

MEDICATION ADMINISTRATION RECORD REPORT

Avatar CWS→Reports→Medication Administration Record Report

By client and date range. Report of progress notes written for medication administration. Displays with most recent note first.

PRE TO 3 DX REPORT

Avatar CWS→Reports→Pre to 3 DX Report

TRANSFER/DISCHARGE REQUEST REPORT

Avatar CWS→Reports→Transfer/Discharge Request Report

By client and request date. Request date lists only those dates that have an existing transfer/discharge request.

DAY TREATMENT PROGRESS NOTES REPORT

Avatar CWS→Reports→Day Treatment Progress Notes Report

MANAGER / SUPERVISOR REPORTS

The following reports are typically used by managers and supervisors.

CASELOAD REPORT BY PROGRAM

Displays a list of all clients opened to a program, broken down clinical staff. The report also displays the date of the last service.

PROGRAM CENSUS REPORT

Avatar CWS→Reports→Caseload Report by Program

Displays an alphabetic client list for a specified program. The report includes the MR#, admission date, date of birth, therapist, and psychiatrist. A total headcount appears at the end of the report.

TRANSFER/DISCHARGE REQUEST REPORT

Avatar CWS→Reports→Transfer/Discharge Request Report

This report displays a list of all Transfer/Discharge requests for a client and their status.

OTHER REPORTS

There are many administrative reports listed in the Avatar PM menu
(Avatar PM→Reports→<report name>). You may want to look at that menu option to
see what other reports are available.

Exercise 1   Generate and View a Report

*In this exercise you will generate a Progress Notes report for a client that displays all notes
written for a specific episode within a specified date range.*
Before You Begin: *Select a sample client you are working with using the Select Client icon. In this
example the client Adam Apple is used.*

1. Choose Avatar CWS→Reports→ Progress Notes from the Menu Frame.

   The Progress Notes window appears.

2. Follow these steps to begin generating the Progress Notes report:

A Verify the client's
name is in this field.

B Select a start and
end date range.

C Click the
Process icon.

Following is an example of a Progress Note report.

This is a list of all episodes and dates notes were written. Click the plus sign in front of an episode to display the dates, and then click one of the dates to jump directly to that note.

There are 11 total pages in this client's report.

Use the Search Text icon to search for specific words or phrases in all the notes.

3. Click the Close ⊠ button in the upper-right corner of the window to exit the report.

4. Click the Close ✖ icon in the Progress Notes Report window to close it.